

63-115 Interview Requirements

Table of Contents

Interview Requirements	Sections
General	115.1
Rights and Responsibilities/Orientation	115.2
Semi-Annual Reporting Households	115.3
Face-to-Face (FTF) Interview Waivers	115.4
Procedures for Telephone Interview or Home Visit	115.5
No Show	115.6

63-115.1 CalFresh Interview

A. INTERVIEW DEFINITION

1. All households applying or reapplying for CalFresh, including those submitting applications by mail, fax or on-line must be interviewed by a Human Services Specialist prior to initial certification and recertification.
2. The interview is an official and confidential discussion of the household's circumstances with the applicant. The applicant will be made to feel at ease during the interview and in all instances the household's right to privacy will be respected.
3. The interview will be conducted via phone or in the Family Resource Center (FRC). The person interviewed may be the head of household, spouse, any other responsible household member, or an authorized representative (AR) ([63-113.](#))
4. The scope of the interview will not extend beyond the examination of the household's circumstances which directly relate to the determination of eligibility and benefit amount.
5. The individual being interviewed may bring any person he or she chooses to the interview.

B. APPLICATION REVIEW

1. Review the application to verify that all questions are answered, to determine that the information on the form is clear and consistent, and that it is consistent with information given verbally by the applicant or otherwise known to the County.
2. Explore and resolve with the household any unclear and

incomplete information and document any changes in household circumstances that have occurred between the time the application was filed and the time of the interview.

3. Inform non-English speaking households of the right to have an interpreter, and when available, provide forms in their own language. The “Language Needs” form is required for all cases, regardless of the household’s primary language.

Refer to the [Civil Rights Eligibility Desk Guide](#) for a detailed explanation on Civil Rights and Services to Non-English Speaking Applicants/Recipients and the availability of forms and notices in other languages.

63-115.2
Rights and
Responsibilities/
Orientation

All Households shall be advised of their rights and responsibilities during their certification interview. Staff must give the applicant /recipient ample time to read all the information provided or take the time to review all the information with the applicant/recipient, or both. Simply providing the applicant/recipient with written materials regarding his/her rights and responsibilities without verbally reviewing them with the applicant/recipient could result in increased reporting errors, discrepancies, and misunderstandings, as well as inappropriate fraud referrals for investigation.

A. GROUP ORIENTATION

CalFresh applicants are not required to attend group orientation.

Group orientation is a County policy designed to provide applicants for all aids with R&R as well as information on health care options. CalFresh applicants are not required to attend a group orientation as long as their R&R, as stated on the CF 285, are explained during the interview. Use of the group orientation form 07-33 is a County policy and not required under CalFresh regulations.

- CalFresh applicant shall not be required to make an additional trip to the office for the purpose of completing the orientation for CalFresh.
- CalWORKs applicants are required to attend group orientation but CalFresh applicants cannot be denied if they do not attend the group orientation. The worker will do a one-on-one orientation/R&R in this case.

B. ONE-ON-ONE ORIENTATION

In a one-on-one orientation/R&R via telephone or face-to-face

interview, the worker can review the:

- CF 285 (pages 1 of 4 through 3 of 4) for a Non Assistance CalFresh, or
- SAWS 2 Plus (1 of 4 through 4 of 4).

Whether a household attends a group or one-on-one orientation, all applicants must be advised of the following information during the application interview:

1. Application processing time frame
2. Expedited Services (ES) availability and process
3. Electronic Benefit Transfer (EBT) Card and PIN responsibilities
4. 10 day notice of action process and exceptions
5. Nondiscrimination
6. Confidentiality
7. Appeal rights and instructions (found on the back of every notice (NA Back 9)
8. Review of the pamphlet "Your Rights Under California welfare Law" (Pub 13)
9. Penalties/sanctions for failure to:
 - Take required action
 - Cooperate fully with a Quality Control Review
10. Explanation of the availability and amount of the Standard Utility Allowance (SUA)
11. [Semi-Annual Reporting \(SAR\)](#) households must be provided with:
 - a. An explanation of prospective budgeting
 - b. A (manual) SAR 7 form and how to complete and submit (by the 5th no later than 11th day of the submit month). SAR 7 can be submitted by mail, fax in office or online via [My Benefit CalWIN](#).
 - c. SAR 7 reporting verification requirements
 - d. A review of CF 23 SAR and how to report household (HH) changes. HH can report changes either by mail, telephone, in person at the office, or by turning in a Mid-Quarter Status Report or CF 377.5 SAR. Refer to [63-271.7](#) for examples on mandatory mid-period change reports.
12. ACCESS phone number so that household can call to ask questions or obtain help on how to complete the SAR 7. Collect

calls will be accepted from households living outside the local calling area.

13. [Change reporting \(CR\)](#) households must be provided with:
 - a. An explanation of prospective budgeting.
 - b. A review of CF 23 CR and how to report household (HH) changes (Change Reporting households may report changes either by mail, telephone, in person at the office or by turning in a DFA 377.5 "Food Stamp Household Change Report" form.)
 - c. An explanation of household's responsibility to report changes within 10 days (changes of earned income over \$100.00, unearned income over \$50.00 see section [63-261.1](#), [63-261.2](#) and [63-261.3](#)).
 - d. ACCESS telephone number and that collect calls will be accepted.

The worker must confirm with the applicant that they understood their R&R and have no other questions. The worker will narrate thoroughly in case comments that they verbally advised the client of their R&R.

In General the CF 285 should be used for a CalFresh application. However, if a SAWS 1 is received for a CalFresh application, the Rights and Responsibilities pages of the CF 285 (pages 1 of 4, 2 of 4 and 3 of 4) should be reviewed with the customer and provided to them.

If the application is for multiple programs (e.g. CalWORKs and Medi-Cal) then the SAWS 2 Plus should be used.

63-115.3
Semi-Annual
Reporting
Households

Provide to households subject to Semi-Annual Reporting (SAR) requirements the the following at the initial certification and recertification interviews:

- A blank copy of the SAR 7 and the [SAR 7A, "How to Fill Out Your SAR 7"](#);
- Explain to all SAR households how to fill out the SAR 7, the date it's due and reporting requirements; and
- Assistance, if requested, in completing the SAR 7 and getting required verifications.

63-115.4

All CalFresh applicants must be interviewed. With the implementation

Face-to-Face
Interview
Waivers

of the face-to-face interview waiver, an interview shall be conducted by telephone, unless the face-to-face interview cannot be waived.

A face-to-face interview must be conducted in the following circumstances:

- A household requests a face-to-face interview, or
- The worker determines it is necessary to verify conditions of eligibility, or
- A household is also applying for another assistance program which requires a face-to-face interview (such as CalWORKs or General Relief).

The worker must document in case comments the reason why a face-to-face interview is necessary. Examples include, but are not limited to questions about out of state residency, expenses exceeding reported income over an extended period of time.

Note: For a CalWORKs/CalFresh joint application, a telephone interview could be scheduled for CalFresh if CalWORKs is denied only due to the applicant not showing for the first interview. The worker must send the Notice of Missed Interview (NOMI) DFA 386 for CalFresh.

The worker will continue to verify and review the information and supporting documentation supplied by the household, and take the same actions during a telephone intake interview as with a FTF interview.

Waiver of the FTF interview does not exempt the household from the verification requirements. Collateral contact or receipt of documentary evidence by mail may be necessary.

Refer to [63-116](#) for regulations regarding the Elderly/Disabled Recertification Interview Waiver from November 2013 thru April 2015.

63-115.5
Procedures for
Telephone
Interview or
Home Visit

When the office face-to-face interview is waived, the FRC staff shall:

1. Accept the CalFresh application via in office, mail, fax, or on-line (via My Benefits CalWIN or One-e-App).
2. Assign to the appropriate worker;
3. Evaluate for Expedited Services;
4. Schedule a telephone interview appointment and mail the required application forms (CalFresh Guide [63-103.3](#)

- Application and Recertification Packets); and
5. Conduct a telephone interview; or
 6. Schedule a home visit interview and mail all the required application forms

Telephone Interview

A telephone interview does not change any other interview requirements. The worker must review the application form (CF 285 or SAWS 2 Plus or CalWIN interactive interview) question by question with the client, explain the R&R, and obtain all required verifications.

Once a signed CF 285 or SAWS 2 Plus is received, workers will not be required to mail the application and/or required forms to the household for signature after conducting a telephone interview.

Click on [this link](#) to access the CalFresh Interview checklist Desk Aid for Human Services Specialists.

Home Visits

When the interview cannot be conducted by telephone, a home visit may be scheduled. An example of a home visit includes, but is not limit to if the applicant has no phone and can't come the office due to a hardship. Hardship conditions include, but are not limited to, illness, elderly and/or disabled. Home visits must be scheduled in advance with the applicant.

1. During the home visit or telephone interview the worker will:
2. Evaluate for expedited services; and
3. Review and resolve with the household any unclear and incomplete information. When the information on the form is incomplete, the worker will make corrections on the form; and
4. Document the changes; and
5. Request any required documentation or verification(s) when the information on the application is incorrect/incomplete or when the information in the case file is not clear, complete or correct; and
6. Advise the household of their rights and reporting responsibilities ([63-115.2](#)).

Note: For a CalWORKs/CalFresh joint application, a telephone interview must be scheduled for CalFresh if CalWORKs is denied only due to no show for the first interview. Send a "Notice of Missed

Interview” (DFA 386).

63-115.6
No Show

If the household fails to appear for the intake interview, or the worker is unable to reach the client by phone, a “Notice of Missed Interview” (NOMI DFA 386) must be sent advising the household that it is their responsibility to reschedule another appointment (CalFresh [63-103.9](#) Disposition of Application).

A CalFresh application must not be denied until 30 days after the date of application ([63-109.3](#)), after the NOMI has been sent giving the household the chance to reschedule the phone or face-to-face interview.

The worker will:

- Not deny a household’s application prior to the 30th day after initial application when the household fails to be available for the first scheduled phone or face-to-face interview and has made no subsequent contact with the County expressing interest in pursuing the application.
- Send a Notice of Missed Interview (DFA 386), directing client to contact the FRC (specifying the time frame to reschedule the interview) to schedule a second appointment.

If	Then
The household does not contact the FRC	The application will be denied on the 30 th day following the date of the application. The denial NOA (DFA 377.1A) will be mailed on or after the 30 th day following the date of application.
The applicant reschedules the first interview, but fails to appear for the second interview	The application will be denied on the 30 th day following the date of the application.

NOTE: If the household contacts the FRC and the County fails to attempt to reschedule the initial interview within 30 days of the date the application was filed, then it is the fault of the County ([63-109.5](#)).

For cases where the 30th day falls on a weekend or holiday, the application must be denied after the 30th day (the day after the weekend/holiday) in order not to deny the case prior to the 30th day deadline.

Note: Before the NOMI is sent to the applicant, the worker is to ensure that the office intake rescheduling phone number is entered on

the:

- CalWIN NOMI in the IVR Phone Number field of the correspondence variables, or
 - NOMI DFA 386 manually (to be used when CalWIN is not available)
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